

Products

- Dynamics 365 for Finance and Operations & Dynamics AX
- Dynamics GP
- Dynamics 365 Business Central & Dynamics NAV

Benefits

- Enforce your chart of accounts (COA) and enable accurate forecasts
- Perform what-if analysis to immediately see the impact of business decisions
- Automate P&L, balance sheet, and cash flow reporting
- Boost security by restricting access to sensitive information
- Create and track driver-based plans while considering periodic trends
- Compare actuals versus budgets and analyze variances
- Drill through underlying transaction details, trend analysis, filters, and multidimensional hierarchies
- Reduce time spent on budgeting and forecasting and lead time business to board by 50–90%
- Improve team collaboration and communication
- Gain full transparency and accountability of the entire process

Performance Canvas Financials

The reporting, budgeting, forecasting, and consolidation solution built to streamline and automate your Microsoft Dynamics Budget Process

Performance Canvas Financials is a complete and cloud-based financial reporting, budgeting, forecasting, and consolidation solution that is easy to set-up, quick to implement, and is built from the ground up to integrate with Dynamics 365 Business Central (Dynamics NAV and GP) and Dynamics 365 for Finance and Operations platforms (Dynamics AX).

Why do I need an add-on solution to my current system?

- **Dynamics 365 Business Central and Dynamics 365 for Finance and Operations require assistance to control the budget process properly**

While Dynamics applications have showcased significant strides in trying to improve the budget process, several moving parts in the process have to be executed perfectly before you can get the numbers right into Dynamics. This is where Performance Canvas Financials come in handy.

- **Excel spreadsheets are not sustainable**

Excel spreadsheets are notorious for being error-prone, inflexible, and complex to maintain over time. You cannot let Excel spreadsheets hinder your business from growing and reacting promptly to market stressors. Excel spreadsheets cannot afford your organization consistency, ease in collaboration, and accuracy.

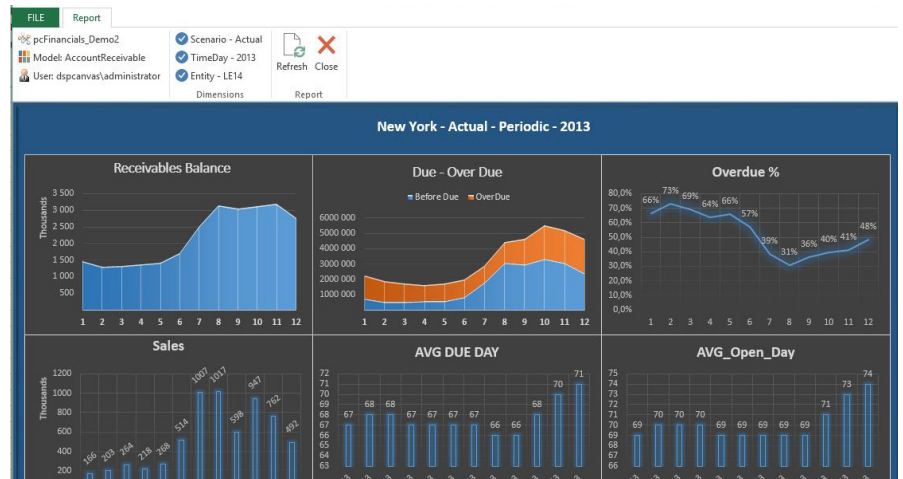
- **It would be best if you freed finance team capacity to drive productivity and creativity**

It will be such a shame to have your analysts do more spreadsheet wrangling than analyzing. By saving them time and effort, you give them more time to focus on high value yielding tasks.

What is the difference between the budget process in Business Central/ Dynamics 365 for Finance and Operations than the budget process in Performance Canvas Financials?

Here are a few of the main differences:

- Budgets in NAV, AX or GP are rigid and inflexible while the budgets in Performance Canvas Financials are flexible and configurable to how your business operates.
- Budgets in NAV, AX or GP only support up to 4 dimensions whereas Performance Canvas Financials support unlimited dimensions.
- Budgets in Performance Canvas Financials are workflow-driven whereas NAV, AX, and GP budgets are not.
- Performance Canvas Financials have sophisticated features that enhance overall collaboration during the budget process whereas NAV, AX, and GP do not.
- Performance Canvas Financials have a drag and drop wizard for reporting, and it has over 30 predesigned templates making report generation effortless.



The screenshot shows the "Dimensions" configuration screen in Performance Canvas. The "Members" tab is selected, showing a list of members for the "AC_NET_INCOME - NET INCOME" dimension. The list includes members like "4000 - Sales - Machined", "4008 - Revenue Internal Contra", "4010 - Sales - Fabricated", "4020 - Sales - Configured", "4030 - Sales - Machine Bld", "4040 - Sales - Field Srv", and "2010 - Sales - 3 Year Contracts".

The screenshot shows the "Input" screen for a budget. A table displays budget data for "Financials - LE14 - Budget - 2015 - USD". The table has columns for years 201501 through 201512, and rows for various expense categories. A "Spreading" dialog box is open, showing the "Amount" field set to 23500 and the "Method" set to "Last Year Same Amount".

Category	201501	201502	201503	201504	201505	201506	201507	201508	201509	201510	201511	201512	Budget 2015	Actual 2014
Total Operating Expense														
5700-Salaries-Category 1	4250	3859	4705	5978	3864	5955	5114	5159	5296	6409	5364	4546	60285	60285
5701-Salaries-Category 2	4250	3859	4705	5978	3864	5955	5114	5159	5296	6409	5364	4546	60285	60285
5702-Salaries	591	646	646	828	518	828	709	737	891	746	1009	846	846	846
5200-Commission	1099	809	1212	1553	966	1553	1326	1288	1383	1687	1402	1440	15796	15796
Total Personnel Exp-Total Personnel Exp	5940	5214	6362	8356	5348	8356	7149	7147	7415	8987	7531	6994	86937	86937
6013-Travel & Ent Exp-Category 1	568	455	568	796	455	796	682	682	682	909	682	796	8069	8069
6014-Travel & Ent Exp-Category 2														
Travel Exp-Travel & Ent Exp	568	455	568	796	455	796	682	682	682	909	682	796	8069	8069
6101-Administrators Exp	909	682	6000	1364	3250	1364	2600	1137	1364	1593	1364	1364	23186	23186
8150-Supplier Exp														
Total Dept Exp-Total Dept Expense	7417	6900	13130	10517	9052	10494	10631	8966	9460	11467	9556	9153	118181	118181
6200-Sales & Marketing Expense	6500	6500	6500	3348	7000	5348	6000	1046	1182	1455	1182	1128	45626	37626
8100-General & Administrative Expense	4500	3500	6818		4546	6818	9091	6818	4250	71340	4250	71340	71340	71340
6200-Depreciation	1818	1591	2273											
6200-Amortization														
4000-Dividend Expense														
NonCapital Exp-Travel/Nondepartmental Expense	1818	1591	2273										27727	27727
ICDIF-Matching P&L														
Total Exp-Total Operating Expense	20235	17941	29122										260886	260886

Everything you need to know about Performance Canvas Financials

What is it?

Performance Canvas Financials is add-on software to your Dynamics 365 Business Central or Dynamics 365 for finance and operation platform. It is a unified solution for financial reporting, budgeting, forecasting, consolidation, and metrics management. It is also subscription-based.

Who should use it?

Small to large businesses that use Dynamics 365 Business Central or Dynamics 365 for finance and operations platform. It is an ideal software for finance teams with at least three people working on budgets and reports and for those who want to cut their budget cycle time to half of what it used to be by using best practices.

How long does installation take?

Performance Canvas Financials boasts of a 5-minute automated install and setup. After 5 minutes, you get budgets, actuals, and live forecasts up and running. It can achieve this because it is composed of prepackaged finance logic ready to be deployed and used.

Does it support uploading budgets into Dynamics NAV, AX, or GP?

Yes, this software is designed to integrate seamlessly with Dynamics 365 Business Central platform and Dynamics 365 for Finance and Operations platform.

What key features does it include?

- 5-minutes fully automated install and setup
- Actuals, budgets, and live forecasts up and running immediately after installation
- Cloud-based BUT can connect to any onprem ERP systems
- Sleek-looking and user-friendly dashboard
- Simpler, faster, and laser-focused collaboration capabilities
- It delivers modern best practices out-of-the-box such as live forecasting, driver-based budgeting, unlimited what-if analysis, allocations, and multiple assumptions.



Property	Value
MemberID	1,147
MemberKey	4000
MemberDescription	Sales - Machined
HelpText	Sales - Machined
AccountType	Income
BP_Budget	INPUT
CTA_Account	NONE
IC	☐ GroupYN
IC_OTHER	☐ IC
ICELIM	NONE
ICELIM_HOLDING	☐ ICELIM_HOLDING
ICMATCH	NONE
KeyName_Account	
Rate	Average

Scenario	Scenario Type	Description	Member Key	Actual Overwrite	Auto Actual Refresh	Input Allowed	Auto Save on Close	Closed Month	Active
Actual	Actual	Actual	ACTUAL	☒	☒	☐	☐	2018-04	☒
Live Forecast	Live Forecast	Live Forecast	FORECAST	☒	☒	☒	☒	2018-04	☒
Budget	Budget	Budget	BUDGET	☐	☐	☒	☐	2017-12	☒

Is there role-based security?

Yes, you can control what each user sees, and the administrator can easily view and edit what other users are allowed to view.

Does it support non-financial values?

Yes, it supports both financial and non-financial values.

Is there a free trial?

Yes, we offer a 30-day free trial.

Email info@dspanel.com to know more or visit www.performancecanvas.com for more information.

Other Benefits:

Seamless integration with any ERP System

- PCF integrates with cloud ERP systems and on-premises ERP systems alike
- OLAP cubes/data warehouse database tables stored on powerful servers in the cloud—relieving your ERP from reporting burdens
- Import of initial budgets from Excel or external files—where you need to include COA
- Budgets can be uploaded back to ERP system
- External data sources supported via Excel or web services
- Export to Excel from web

Radically improved FP&A capabilities

- Enter your budget or forecast in web or Excel
- Overview of pending tasks, person responsible, and task status
- No need to reject or approve all numbers—select numbers can be approved or rejected

Actuals vs budgets comparisons

- Unlimited number of scenarios and budgets
- Supports unlimited number of entities
- Driver-based budgeting
- Rolling forecasts and live forecasts
- Full Excel capabilities enabled—conditional formatting, formulas, cell references, charts, and calculated fields
- Excel reporting and sending of reports via email
- Dynamic periods
- Financial and operational modeling
- Drill up, down, and through capabilities
- IFRS and US GAAP supported

Secure and comprehensive

- Multiple user authorization and security levels
- Simplified and controlled data entry through preset business rules
- Self-check mechanism

- Functionality to easily review pending and submitted tasks
- Compatible with mobile, PC, and Mac

User-friendly

- Sleek-looking and modern user interface
- Easy editing and maintenance of FP&A COA hierarchies
- Simplified user access management
- Easy configuration of preferences setup
- More than 30 ready-made budget report templates available
- Drag and drop report wizard
- Automatic submissions across the entire platform

Minimum system requirements

- X Microsoft Excel 2010 or later
 - » 32- or 64-bit version
 - » Microsoft Excel must be license activated—trial license is too limited
- Minimum physical memory available to Excel
 - » 2 GB RAM (32-bit)
 - » 3 GB RAM (64-bit)
- Windows 7 or later
- Browser
 - » Any modern browser

About DSPanel

DSPanel is the company behind Performance Canvas Financials. DSPanel delivers a complete and cloud-based FP&A solution that will put your business into overdrive.

DSPanel prides itself on not just providing superior software technology but also superior business acumen. The back bone of our technology is the business user. Whether deploying in the cloud, in Excel, or on a mobile device, DSPanel enables users to bridge the gap between data and business without needing to learn a new language. Visit www.performancecanvas.com or email info@dspanel.com for more information.